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Valentine et al.(10) **Pub. No.: US 2021/0274037 A1**(43) **Pub. Date: Sep. 2, 2021**(54) **SYSTEMS AND METHODS FOR CLIENT
RELATION MANAGEMENT***H04L 29/08* (2006.01)*H04M 3/51* (2006.01)*G06Q 30/00* (2006.01)(71) Applicant: **Lucency Technologies, Inc.**, Lehi, UT
(US)(52) **U.S. Cl.**
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H04L 67/22 (2013.01); *H04M 3/5183*
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3/523 (2013.01)(72) Inventors: **Neil Valentine**, Lehi, UT (US);
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Lehi, UT (US)(21) Appl. No.: **17/320,735**(22) Filed: **May 14, 2021****Related U.S. Application Data**(63) Continuation of application No. 16/384,801, filed on
Apr. 15, 2019, now Pat. No. 11,012,557.(60) Provisional application No. 62/657,717, filed on Apr.
13, 2018, provisional application No. 62/746,354,
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62/780,035, filed on Dec. 14, 2018.**Publication Classification**(51) **Int. Cl.***H04M 3/42* (2006.01)*G06F 16/9535* (2006.01)*G06Q 30/02* (2006.01)*G06Q 10/06* (2006.01)*H04M 3/523* (2006.01)(57) **ABSTRACT**

Systems, methods, computer systems, and computer-readable code for implementing methods for client relation management in which fewer call-in numbers need to be maintained. A method for client relation management preserves a more-complete record of online and offline interactions of a customer with systems provided by a plurality of service providers. A session identifier (SID) is associated with a customer upon interaction of the customer with a website provided by a first service provider. Website interaction information is received from the first service provider and is associated with the SID. Information associated with an incoming call from the customer at a call-in number at a call center maintained by a second service provider is used to associate the incoming call with the SID, creating a record of an offline interaction between the customer and an agent of the call center. The record of the offline interaction is associated with the SID.

